APPLICANT USER GUIDE FOR E-PLAN
(Electronic Plan Review)

Overview of Electronic Permitting Process

Completed Application submitted to Building Department via buildingdocs@wellingtonfl.gov email.

Building Department enters application into system.

Email and Task sent to applicant to upload plans. Applicant also must pay Permit Fees and Fire Fees (if applicable).

Applicant uploads plans, pays fees, and completes ApplicantUpload task.

Pre-Screen performed by Building Department. If not all documents are uploaded or if something is incorrect, this task will be returned to applicant.

Building Department starts workflow. Permit is routed to agencies.

Building   Electrical   Mechanical   Plumbing   Fire   Engineering   Zoning

Plans are reviewed by all applicable agencies.

When all agencies have reviewed the plans, Building Department will notify applicant by email.

Corrections Required?

Yes

No

Applicant will receive email listing required corrections

Building Department will forward the resubmitted plans to agencies for re-review.

Applicant will make required changes and resubmit these by uploading the files and complete Resubmittal task.

Applicant is notified by email that his/her plans have been approved. Applicant must pay remaining fees and complete PaymentSelection task.

Building Department will issue permit and Applicant will be able to download APPROVED plans. Permit must be printed out and on job site for inspections.

Introduction to Electronic Plan Review (EPR)

Electronic Plan Review (EPR) is a web-based electronic plan and document workflow solution that allows citizens and government personnel to initiate and complete the construction plan submission, review, and approval process online, rather than using a manual paper-based process, thus replacing the traditional paper-based review method.

Electronic Plan Review will greatly reduce the time it takes for the plan review cycle. Once all plans and documents have been submitted, they are forwarded, electronically, to all reviewing agencies *at the same time*! A significant savings in plan review time have been noted.

An additional cost savings will be realized by eliminating the 2 sets of plans for projects that was typically required before EPR. By using EPR, after all reviews have been completed, approved, and plans are ready to issue, only the final approved/stamped set will require printing. This can result in a savings of hundreds of dollars in printing costs for the design professional.

This manual provides basic documentation on the steps involved in the Electronic Plan Review process. It has been prepared as a general reference guide and is not designed to present every detail or situation on every element of the process.

If at any time in the process you have questions or concerns, do not hesitate to call or e-mail the Building Department:
 • (561) 753-2430   • buildingdocs@wellingtonfl.gov

Electronic Plan Review System Information

1. Electronic Plan Review (EPR) is a web-based program. In order to use this software, the user must have internet access and must use the 32-bit version of Internet Explorer, Chrome, Firefox, or other internet browsers.

2. In order to log in to EPR, you must have an e-mail address and a password. The first time you are invited to upload plans, you will be given a temporary password. NOTE: this temporary password is case sensitive.

3. All users of the EPR software will upload plans and other documents electronically. Silverlight must be installed on the Computer you are using to upload.

4. Internet Explorer users of the EPR software must install a small viewer program the first time they log in to the system. You will be prompted to install this small viewer software program. All other browser use a HTML5 viewer which does not require an install.

5. All drawings that you upload need to follow the standards outlined later in this document. Please read the standards before creating the files for uploading.

6. In order to log into the system, your Pop-up Blocker must be turned off. If it is not turned off, you will get this friendly notice. To turn off your pop-up blocker:

•Go to the TOOLS menu >   •Click POP-UP BLOCKER >   •Click TURN OFF POP-UP BLOCKER

7. For specific instructions for installing the Internet Explorer Viewer or Silverlight, please refer to the following web page for detailed instructions: http://wellingtonfl.gov/departments/building/electronic-permitting.html

File Plan Naming Standards

Standard SFR Plan File Naming Standards
The sheet number must be preceded by the plan model number. Sheet numbers do not need to be sequentially numbered. For the Cover Sheet and Index Sheet, place a leading 0 as part of the Sheet ID for sorting purposes.

Example model filename: 17Ø1AØØ1.dwf

Discipline Content	Model Name	Sheet ID	Sheet Number	Example File Names
Cover Sheet	(master sheet)	ØCS	ØØ1	ØCSØØ1
Index Sheet	(master sheet)	ØIS	ØØ1-999	ØISØØ1
Architectural	1701	A	ØØ1-999	17Ø1AØØ1
Architectural Details		AD	ØØ1-999	ADØØ1
Interior Design		ID	ØØ1-999	IDØØ1
Electrical	1701	E	ØØ1-999	17Ø1EØØ1
Mechanical	1701	M	ØØ1-999	17Ø1MØØ1
Gas/Plumbing	1701	P	ØØ1-999	17Ø1PØØ1
Structural	1701	S	ØØ1-999	17Ø1SØØ1
Structural Details		SD	ØØ1-999	SDØØ1
Survey	1701	SU	ØØ1-999	SUØØ1
Landscape		LP	ØØ1-999	LPØØ1

Custom SFR Plan File Naming Standards

The Sheet Number must be preceded by the Plan Number. For the Cover Sheet and Index sheet, place a leading Ø as part of the Sheet ID for sorting purposes.

Example filename: AØØ1.dwf

Discipline Content	Sheet ID	Sheet Number	Example File Names
Cover Sheet	ØCS	ØØ1	ØCSØØ1
Index Sheet	ØIS	ØØ1-999	ØISØØ1
Architectural	A	ØØ1-999	17Ø1AØØ1
Interior Design	ID	ØØ1-999	IDØØ1
Electrical	E	ØØ1-999	17Ø1EØØ1
Mechanical	M	ØØ1-999	17Ø1MØØ1
Gas/Plumbing	P	ØØ1-999	17Ø1PØØ1
Structural	S	ØØ1-999	17Ø1SØØ1

Landscape	LP	ØØ1-999	LPØØ1
Civil	C	ØØ1-999	CØØ1
Survey	SU	ØØ1-999	SUØØ1
Alternate Method	AM	ØØ1-999	AMØØ1

Commercial Plan File Naming Standards

The Sheet Number must be preceded by the Plan Number. For the Cover Sheet and Index Sheet, place a leading Ø as part of the Sheet ID for sorting purposes.

Example filename: AØØ1.dwf

Discipline Content	Sheet ID	Sheet Number	Example File Names
Cover Sheet	ØCS	ØØ1	ØCSØØ1
Index Sheet	ØIS	ØØ1-999	ØISØØ1
Architectural	A	ØØ1-999	17Ø1AØØ1
Interior Design	ID	ØØ1-999	IDØØ1
Electrical	E	ØØ1-999	17Ø1EØØ1
Mechanical	M	ØØ1-999	17Ø1MØØ1
Gas/Plumbing	P	ØØ1-999	17Ø1PØØ1
Structural	S	ØØ1-999	17Ø1SØØ1
Landscape	LP	ØØ1-999	LPØØ1
Civil	C	ØØ1-999	CØØ1
Survey	SU	ØØ1-999	SUØØ1
Alternate Method	AM	ØØ1-999	AMØØ1
Life Safety Package and Master Egress	LSP	ØØ1-999	LSPØØ1
Smoke Control	SC	ØØ1-999	SCØØ1

File Type Standards

- Only searchable PDF files are accepted for calculations, reports and other supporting documentation (non-drawing files).
- Both vector PDF and Design Web Format (DWF) files will be accepted for drawing files. Since AutoCAD software is commonly used to create drawing files, converting a DWG to DWF file print ready is the preferred secured file format. Files must be 2D DWF file print ready, i.e. setup properly for printing with title block, no extra data outside the print page area, etc. The DWF must be saved as Auto CAD version 10 or lower format. Project Dox does not support 3D DWF files.
- If you choose to create your PDF files, you will need to convert your AutoCAD files to a vector PDF by using the AutoDeskVector Graphic Convertor "DWG to PDF.pc3 Plotter Driver."
- Confirm that the lines are dark by changing the background to grayscale prior to saving each page as a separate DWF file with correct pen widths for printing.

Electronic Stamps and Signatures

- All files must be electronically stamped with signature per Florida Statutes and Florida Administrative Code. There are specific provisions for electronic signatures within the Rules and Regulations. Architects and Engineers are responsible to meet the rules.
- Electronic stamps and signatures must be inserted as a JPEG image. Project Dox does not support TIFF images on DWG files.

Graphic Scale

- Each sheet must have a typical graphic scale as shown in the image to the right.
- When more than one scale is used on a sheet, an independent graphic scale must accompany the applicable detail.
- All plans must be drawn to scale.

File Printing Size

- All drawing files must be drawn and formatted for a 24" x 36' sheet file or 11' x 17' sheet file.
- All drawing files must be legible when printed.
- We do recommend printing in color in order to view all stamps on the documents.

Folder Structure Standards

- All drawing files (vector pdf or dwf) must be uploaded into the **Plans** folder for each project.
- All permit application pdf forms and documents (any non-drawing pdf files, i.e. truss calculations, geotechnical reports, etc.) must be uploaded into the **Support Documents** folder for each project.
- All product approval pdf files must be uploaded into the **Product Approvals** folder for each project. This folder is a subfolder of the **Support Documents** folder. You may need to click the **+** sign to expand this folder to view the **Product Approvals** folder.
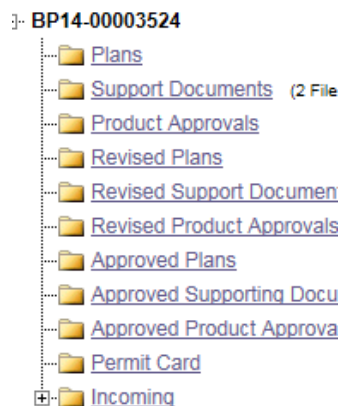
Uploading Plan Drawings & Documents

Electronic Plan Review Invitation

When your application for a building permit is reviewed, accepted, and plan review fees have been paid, an Electronic Plan Review invitation will be sent to your email address. For first time users, the invitation email will contain your login information, temporary password (used only one time) and information about the project, including a link to the electronic plan review web portal.

After clicking on the **Login to Project Dox link** from the invitation email, the first screen you will see will be as shown below.

1. Type in your email address.
2. The first time you log in, type your temporary password that was provided in the email in the spaces provided. Please note that this temporary password is *case-sensitive*.
3. First time users of Electronic Plan Review will want to visit: http://wellingtonfl.gov/departments/building/electronic-permitting.html for more specific instructions.
4. You will see on the log-in screen options to install Project Dox, create a desktop shortcut, or the option to add Project Dox to your favorites. *If you have __not__ used Project Dox before, you will need to install the Components using the link on the log in page before continuing.*

After logging in, the first screen you will encounter will prompt you for information to create your profile. You will need to change your password, complete Applicant information, and provide security questions.

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Once you have completed the steps previously listed, you will now be on the main screen for Project Dox. At the top right hand corner, you will see the various options.

1. **Back/Forward** buttons will back up or move forward one frame at a time. It may be necessary to click the Back or Forward buttons several times before getting to your desired location.
2. The **Projects** button will take you to your projects in the system. Other applicants cannot see your projects and you cannot see theirs.
3. The **Profile** button will take you back to your profile if you wish to change some of the information you previously provided.
4. The **Refresh** button (green icon) will update all of your information. Note: you can also refresh by using the F5 key on your keyboard.
5. The **Search** icon (magnifying glass) searches all information on your plans.
6. The **Help** icon (question mark) provides information on a variety of topics.
7. The **Logout** buttons allows you to logout of the electronic plan review.

The bottom half of your screen will look like the screenshot below. Any projects for which you have access to will display in this list. Any outstanding tasks that require your action are displayed in the **Task** area below the project list. Select the specific project that corresponds to the plans you will be uploading by clicking on the project number.

To upload your plans, you will need to select the project number you are working in. You will then need to select the folder to which the documents correspond (i.e. plans/drawings in the Plans folder, other documentation in Supporting Documents, and product approvals/NOAs in Product Approvals).

THE VILLAGE OF **WELLINGTON**
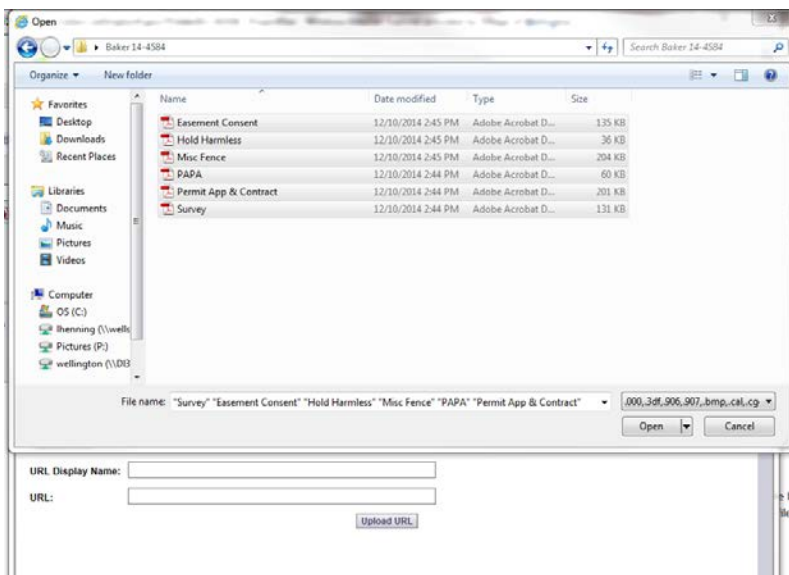
Select **Upload Files**

BP14-00003524

Main Contact:

Folder: BP14-00003524\Support Documents

View Folders Upload Files

Current Sort: - Select -

Select or browse to the file location on your computer as shown in the image to the right. Select or highlight the files you want to upload. Multiple files can be selected by using your Shift or Ctrl keys.

After selecting your documents, you must hit the **Upload** button (nothing happens until this step is taken). The files will be copied to the upload window.

NOTE: Village of Wellington requires each drawing/plan page be identified by a sheet name according to the file naming standards contained in this guide. Please see pages 4-5 for more information.

Once the files are uploaded to either the Plans or Supporting Documents folder, the folder is populated with thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant icons display.

After uploading your documents, you will need to pay the Plan Check Fees and any applicable Fire Fees. You may do so by visiting:

https://accessc2g.wellingtonfl.gov/Click2GovBP/index.html
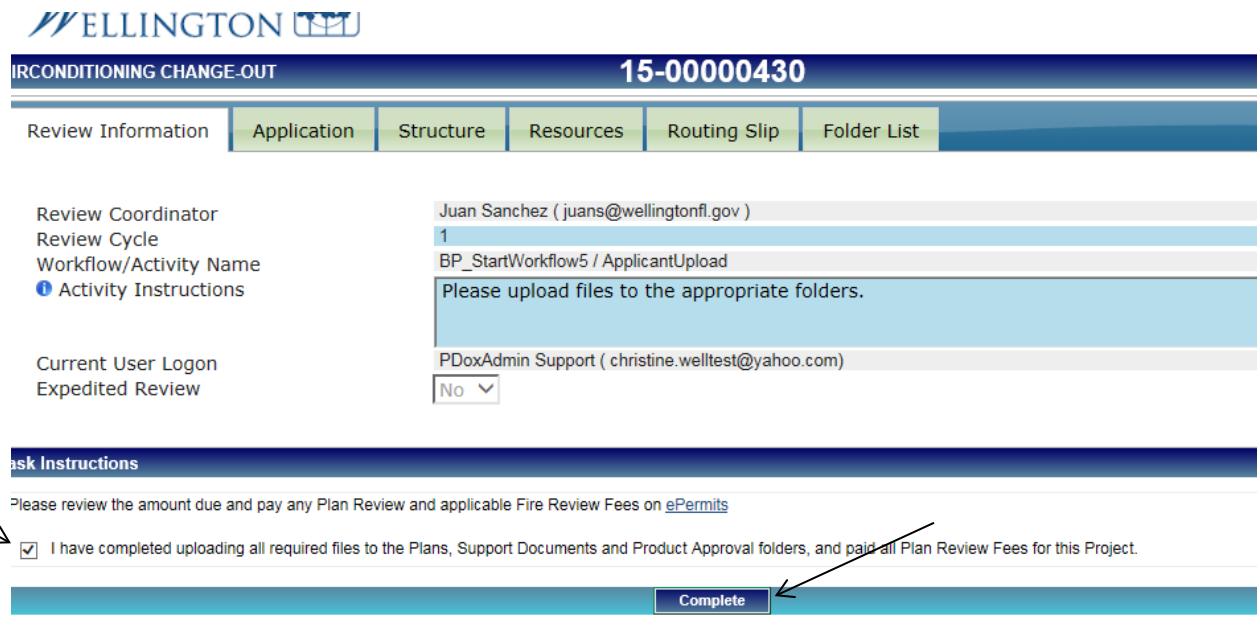
Follow these steps:

1. Select Permit
2. Enter search method (either address or permit number)

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3. On the left hand side, view Application Fees
4. Check boxes for plan check fees & fire fees (if applicable)
5. Follow prompts for payment

After you have uploaded **ALL** documents and paid the plan check fees, the Building Department needs to know that you are ready to begin the Pre-Screening process. Do this by clicking the **ApplicantUpload** task link in the Active Tasks window or within the project.

An eForm will pop up; mark the checkbox to indicate you have completed uploading files, paid required fees and then select the complete button.

Please note, failure to perform the Applicant Upload steps will result in your plans and permit not going to review.

The building department will now receive an email that you have uploaded your plans and other documents.

Pre-screening by the Building Department

Prescreening has been Approved
If your submittal is approved, your plans and documents will be sent the reviewing agencies.

Prescreening has been Returned to You
If your submittal requirement is not complete, you will receive an email notification and a task in your Active Task List that prescreening has been denied and corrections are required. Clicking on the CorrectionsComplete task will open an eForm so you can see the reason why your submittal was returned to you in the comments section.

[See example on following page]

THE VILLAGE OF WELLINGTON

15-00000433

Structure	Resources	Checklist Items (0)	Routing Slip	Folder List

Laura Marchant (lmarchant@wellingtonfl.gov)

1

BP_StartWorkflow5 / CorrectionComplete

Please review the notes and checklist items, then submit the required drawings and documents.

PDoxAdmin Support (christine.welltest@yahoo.com)

No

PRESCREEN COMMENTS

Please upload the documents using Wellington's naming standards.

Please ensure all required fees are paid.

Complete each of these comments and return this task back to us.

> See Prescreen Reviewer's Comments here.

RESPONSE

> When corrections are made, check this box and hit Corrections Complete to send the task back to the reviewer.

> Insert any comments you have here.

VIEW CHECKLIST (0)

☐ I HAVE ADDRESSED ALL OF THE PRESCREENING CHECKLIST ITEMS AND COMMENTS.

| Corrections Complete | Save | Save And Close | Close |

1. Review the comments sent back to you by the Building Department. Click the **Save and Close** button at the bottom of the screen until you are ready to upload missing drawings or documents.
2. After identifying the missing drawings or documents, you will need to upload them to the corresponding folders.
3. Click on the **Task List** button in the project view and select the **CorrectionsComplete** task.
4. After you are satisfied that you have met all of the corrections, check the box and hit the complete button at the bottom. This will notify the building department that you are ready for Pre-Screen review again.

Following the pre-screening, your permit will now be sent to the various agencies for review.

Plan Check Corrections

After plans have been reviewed by all agencies, change marks, review comments, and/or checklist items may require plan corrections or changes:

1. If corrections are required, you will receive an email notification from the building department requesting corrections plans and/or documents.
2. Click the link to **Login to E-Plan** or log in to Project Dox shortcut on your desktop to access your project.
3. Once logged in, select the **ApplicantResubmit** task for your project to accept it and open the eForm and access the corrections requested.
4. The eForm will provide you a list of the comments made by the different agencies. **Save and Close** to exit the eForm.

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Uploading Corrections

1. Login to E-Plan to upload the corrected drawing(s) and/or document(s).
2. Ensure the corrected drawings retain the **same file name** and size as the originals.
3. Verify that all plans and documents that have markups have been corrected. Failure to submit corrected plans will result in a submittal returned for corrections.
4. Upload the files using the same procedure as the initial upload.
5. Once revised files are uploaded to the appropriate folders, you will notice that for each revised file that was uploaded, a **V# (version #)** will appear.
6. When your corrected drawing(s) have been successfully uploaded, click on the **ApplicantResubmit** task to open the eForm and check the boxes confirming that all completed task steps were done and hit **Complete.**
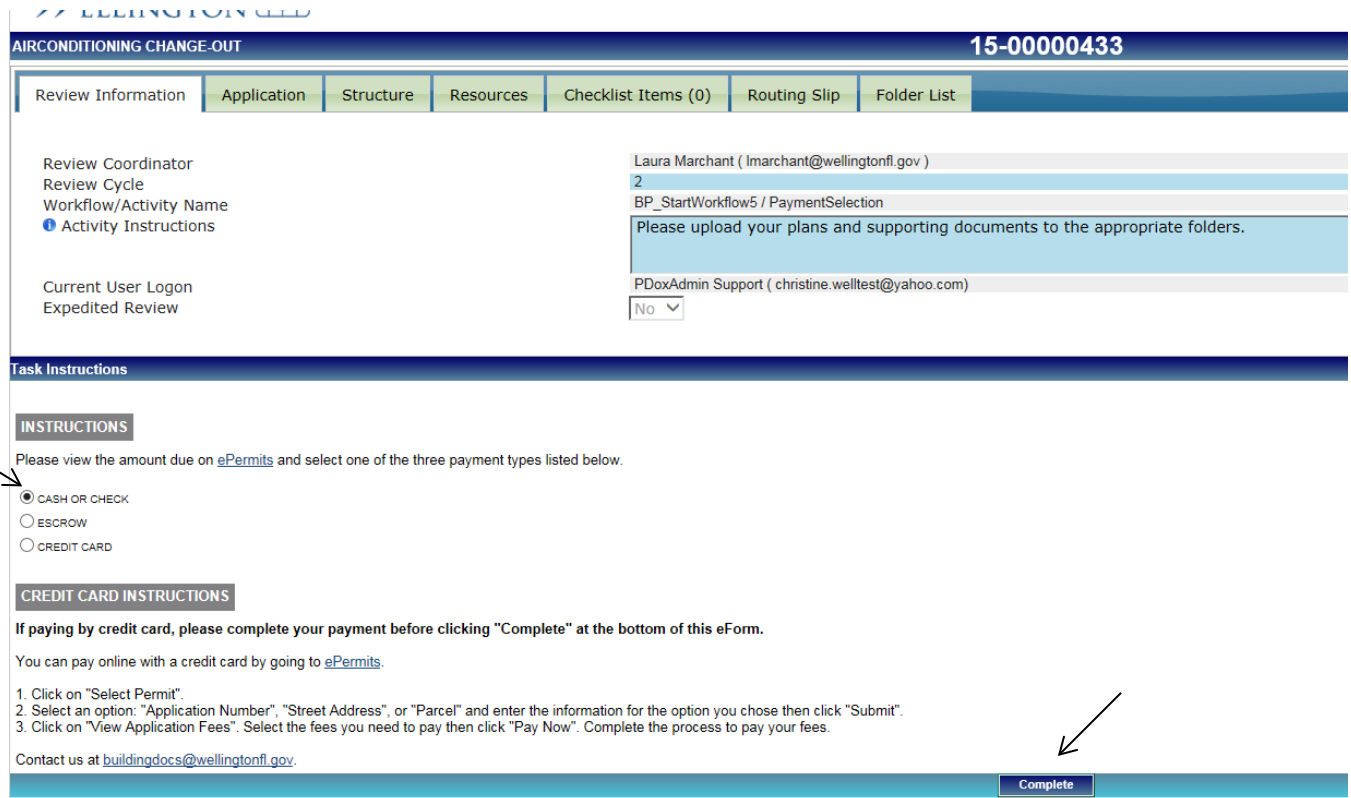

The project will now return to the various agencies for a second review.

Approval

When the plan review is approved by all reviewers, you will receive an email notification about the permit fee payment and an **AwaitingPaymentSelection** task. You will need to check how you paid for your permit fees, check the remaining box, and hit complete.

- If you have not paid all the permit fees previously, you will need to go online and do so and then complete the task.
- If you have previously paid all the permit fees, you do not need to pay but you still must complete the open task.

Please note, failure to complete the **AwaitingPaymentSelection** task will result in the permit not being issued.

Once you have completed the **AwaitingPaymentSelection** task, the building department will receive an email notification stating that you have done so.

The building department will now issue the permit to you. You will receive an email notification that your approved plans and documents are available for download in the **Approved Plans** and/or **Approved Supporting Documents** folder(s).

You will also have a new folder called **Permit Card**. This will contain the permit card that must be on site for your inspections. The second page also includes information on how to schedule your inspections.

BP14-00004628

Main Contact:

Expand current | Collapse | ✓

□ **BP14-00004628**
- 📁 Plans   (3 Files - 0 New)
- 📁 Support Documents   (1 Files - 0 New)
- 📁 Product Approvals   (7 Files - 0 New)
- 📁 Revised Plans
- 📁 Revised Support Documents
- 📁 Revised Product Approvals
- 📁 Approved Plans   (3 Files - 0 New)
- 📁 Approved Supporting Documents   (8 Files - 0 New)
- 📁 Approved Product Approvals
- 📁 Permit Card   (1 Files - 0 New)
- ⊞ 📁 Incoming

Now you are ready to print your documents to have on site for the inspections. Please note, we recommend that you print these documents in color to clearly read the markups done by the plan reviewers.

Plan Revisions during Construction

After your plans have been approved and construction has begun, sometimes changes arise that require revisions to your approved plans or documents.

1. To submit a revision, login to the E-Plan review.
2. Go to the project requiring revision.
3. Upload the completed Revision Request form. You can also email a copy of the request form to buildingdocs@wellingtonfl.gov.
4. Once the building department has received notification, you will receive begin receiving the same tasks as the first review (i.e. **ApplicantUpload** (see page 9), **AwaitingPaymentSelection** (see page 14). All must be completed the same as the first time around.
5. After the plans are reviewed and all tasks completed, you will receive notification that there are new pages to download in the **Approved Plans** and/or **Approved Supporting Documents**. These new files will now need to be on the job site with the original permit documentation.

WELLINGTON

PLAN/PERMIT REVISION FORM
PLEASE COMPLETE ENTIRE FORM

REVISION FEE: $50.00 PER HOUR (MINIMUM = $50.00)   _____ =$50.00

INCREASE CONSTRUCTION VALUE =$_____

$ 50.00 X _____ HOURS   BUILDING BALANCE DUE =$_____

> Complete these sections of form ONLY.

RECEIPT #_____   ZONING BALANCE DUE=$_____

TOTAL BALANCE DUE =$_____

Date:_____ Changes are identified by: ☐ Triangles ☐ Clouds ☐ Other _____

Contractor:_____ Phone #:_____

Address of Job: _____ Suite #: _____ Contractor email:_____

Person to Contact:_____ Cell Phone #:_____ Architect/Eng email:_____

Increase in Value of Work $ _____

Permit #	# of Sets	# of revised pages

☐ **BUILDING**   ☐ **ELECTRICAL**   ☐ **PLUMBING**   ☐ **MECHANICAL**

☐ **ZONING**   ☐ **FIRE**   ☐ **ENGINEERING**   ☐ **LANDSCAPE**

Scope of Revision: _____

_____

_____   _____

PRINTED NAME OF APPLICANT   SIGNATURE OF APPLICANT
**Qualifier/Owner Builder/Agent representing revised trade

_____

Frequently Asked Questions

1. I have forgotten my password. How do I retrieve it?
   - On the main login page, you will need to enter your email address and hit the **Forgot Password** button. This will prompt you with your security questions and allow you to retrieve your password.
2. How do I add another user to a project?
   - If you wish to add another user to a project, you will need to send an email to buildingdocs@wellingtonfl.gov with the permit number, the new user's full name, and their email address. We will add them and they will receive an email notification. We do not recommend adding more than 2-3 users per project.
3. How do I check the status of my permit?
   - If you have completed all of your tasks and the permit is in review, you can visit our E-Permits webpage to check the status of your permit through Plan Tracking Status.

For further assistance, please contact the Building Department:
P: 561-753-2430
F: 561-791-4045
buildingdocs@wellingtonfl.gov